



Seven Secrets of Successful Solicitations



Date: August 25, 2016
Time: 1:00 – 2:30 Eastern Time
Presenter: Anne Melvin
Director of Training and Education
Alumni Affairs & Development
Harvard University





Agenda

1. Role of fear and hope
2. Solicitation prep work
3. Start with a strong foundation for your ask
4. Urgency
5. Leverage
6. Solicitation 301: Getting out the toolbox
7. Responding effectively to resistance



Agenda

Rule of “000’s”

You will be a ‘Solicitation Whisperer!’



FEAR







FEAR

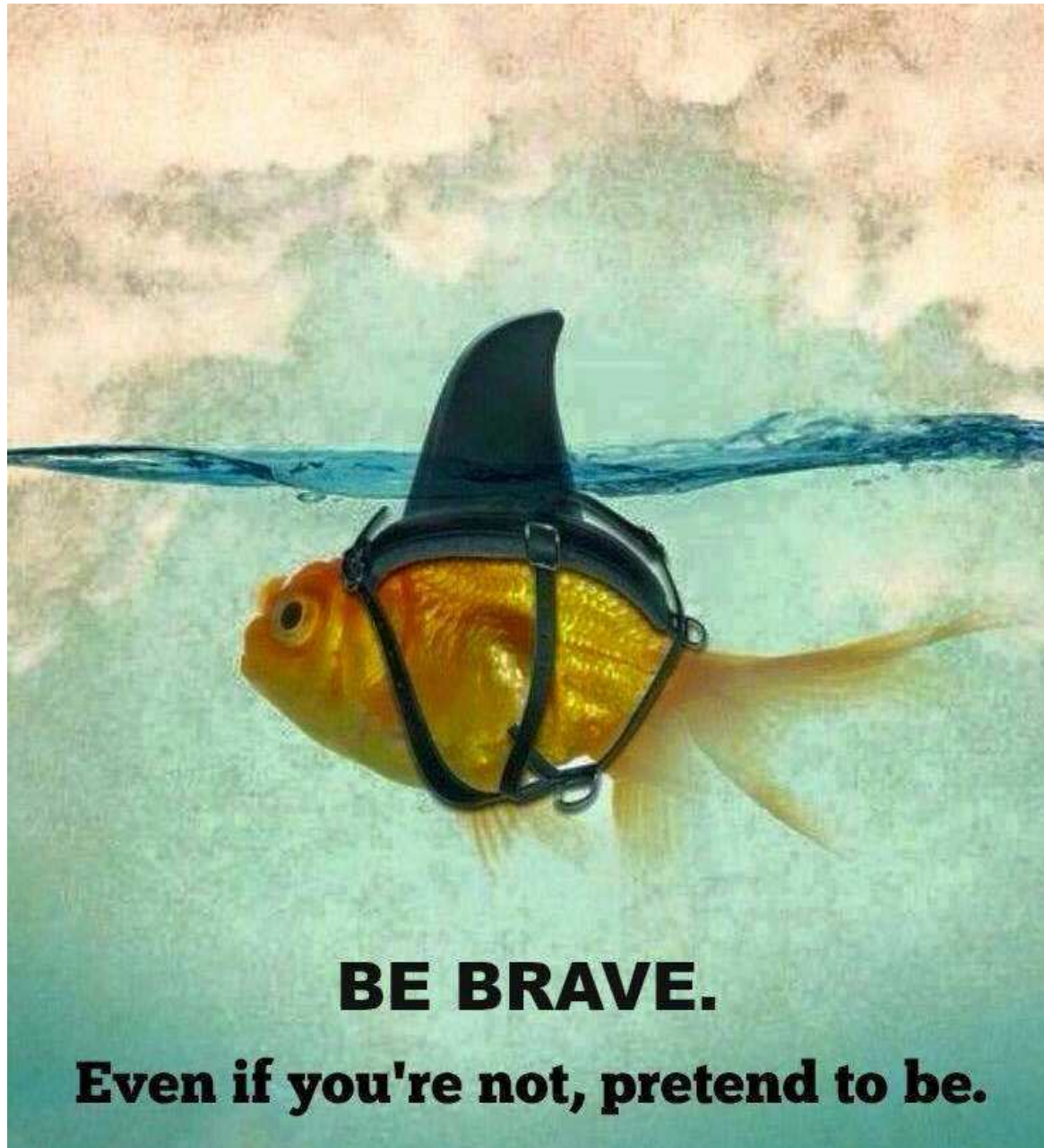
You are not at
the center of
the prospect's
universe





Confidence is the Enemy of Fear



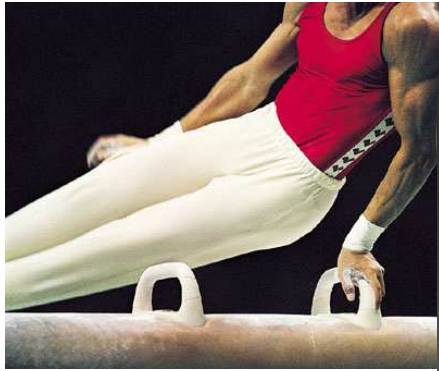


BE BRAVE.

Even if you're not, pretend to be.



Secret # 1: Hope





Secret # 2: Asking is Like Painting...





Secret # 2: Asking is Like Painting... It's All About the Prep Work!





Secret # 2: Solicitation Prep – Goal and Vectors





Secret # 2: Solicitation Prep – Goal

Is your goal *really* a gift?

...then why are you offering more information?

...then why are you offering oodles of time?

...then why are you skirting around the ask?

...then why are you allowing the conversation to wander away from the ask?





Secret # 2: Solicitation Prep – Goal and Vectors





Secret # 2: Solicitation Prep – Vectors



“Yes.”

“No.”

–PITA

“Maybe.”

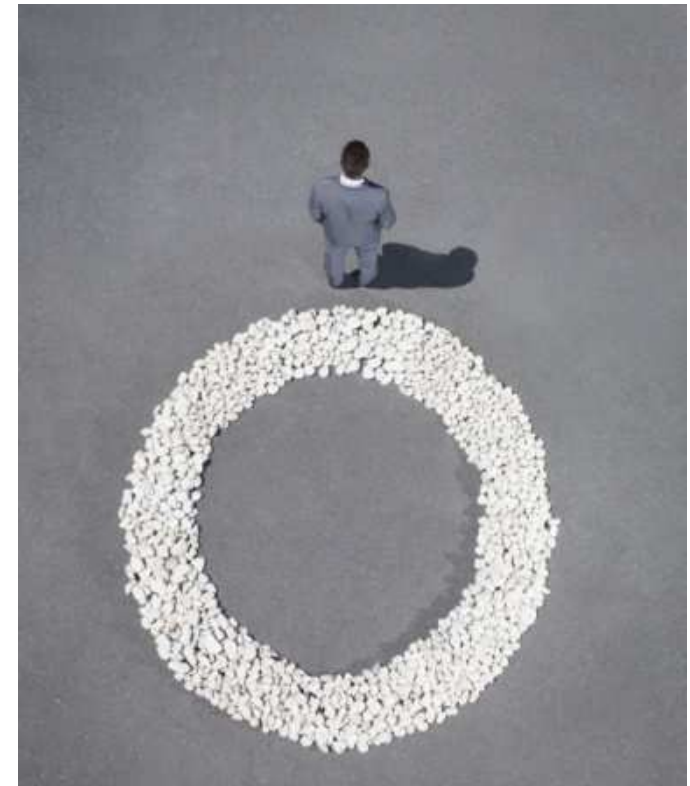
“I need to think about it.”

“I need to talk about this with my husband/wife.”

“Would love to do it. Too big a gift.”



Secret # 2: Solicitation Prep – Vectors





Secret # 3: Start with a Strong Foundation



Catchphrases = Confidence

Secret # 3: Start with a Strong Foundation

“Anne, we’d like you to be a co-chair. Co-chairs need to be at the \$100,000 level to set the bar high for the class.

They also convene class meetings, help solicit other committee members, and lead the team as we move through the campaign. Will you do that for us?”

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“Anne, we’d like you to be a co-chair. Co-chairs need to be at the **\$100,000 level** to set the bar high for the class. They also convene class meetings, help solicit other committee members, and lead the team as we move through the campaign. Will you do that for us?”

Don’t Step on the Ask!



End with the Ask

“Anne, we’d like you to be a co-chair. What a co-chair does is show the class the way forward, convene class meetings, help solicit other committee members, and **LEAD the team** as we move through the campaign. They set the bar high for the rest of the class which is why we ask that the co-chairs **personally commit to a gift of \$100,000**. Will you do that for us?”

End with the Ask

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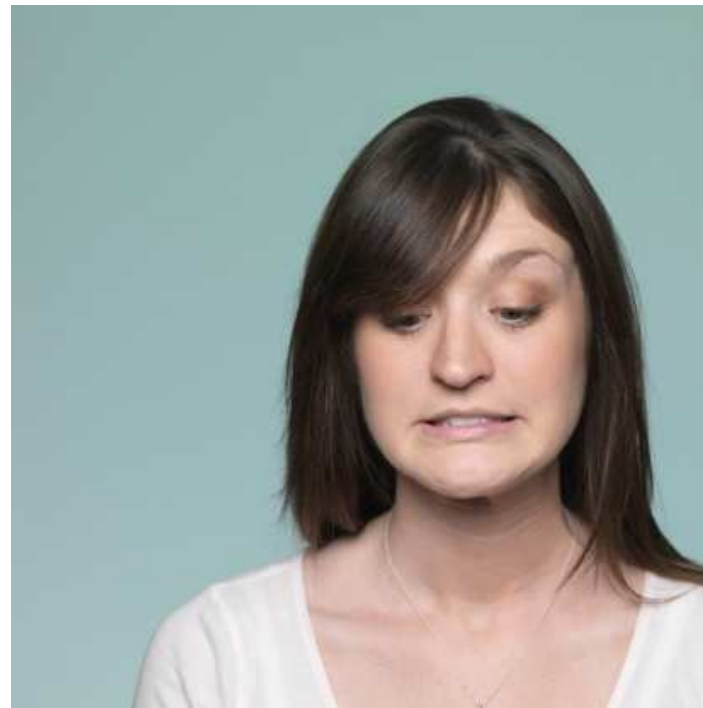
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**If you want the CASH,
end with the ASK!**





Secret # 3: Start with a Strong, Confident Foundation



Confidence.....?



Secret Bonus Tip!

Frame your solicitation as a way to help your prospect





Secret # 4: Urgency





Secret # 4: Urgency

Major gifts:

Limited time opportunity
for gift





Secret # 4: Urgency



Planned gifts:

Limited time
opportunity for gift



Secret # 4: Urgency

Planned Gift





Secret # 4: Urgency

**Limited time opportunity
for mission**





Ask this Question...

**“If this gift
doesn’t
happen, then

happens.”**





Secret # 4: Urgency

**Outline the
future**





Secret #5: Leverage





Secret #5: Leverage





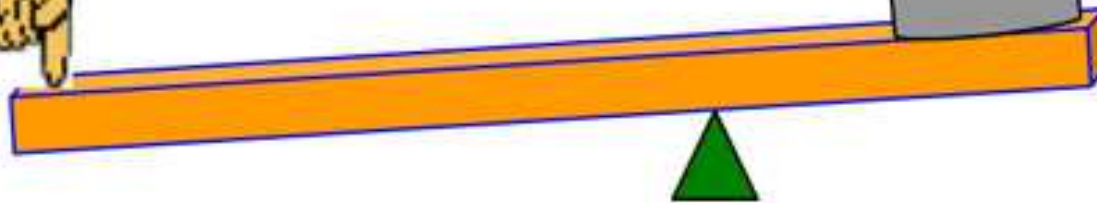
Secret # 5: What is Leverage?

A lever helps lift weights with less effort.

Effort



Load



Fulcrum





Secret #5: Leverage

**What is it
with
your prospect?**





Rhetoric: the Art of Persuasion

1. **Logos**: persuasion using logic or reason
2. **Ethos**: Persuasion by the character of the person or the leader who embodies the values or characteristics of the group
3. **Pathos**: persuasion by causing the listener to feel strong emotions



Poll #1

Which realm of rhetoric is most to least persuasive to humans?

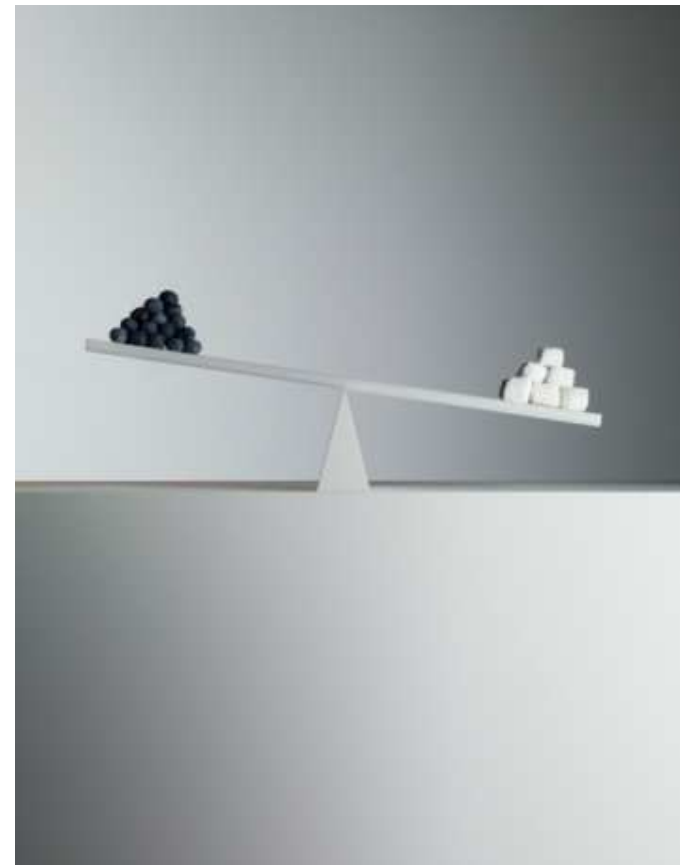


Poll #1 Answer



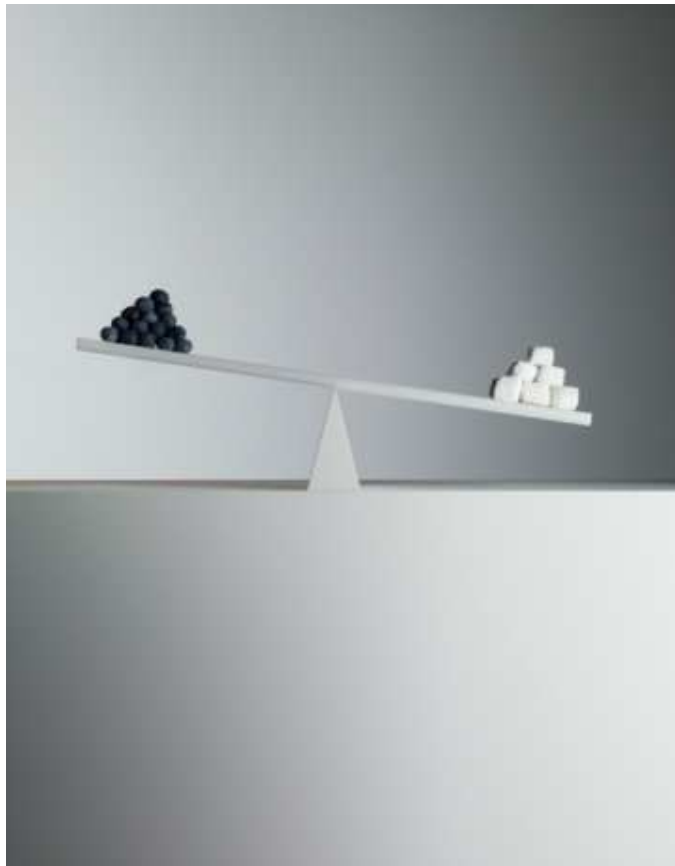
Secret # 5: What is Your Leverage?

- **Mission?**
- **Class or community leader?**
- **Project?**
- **'Ethos' of leader?**
- **Tax event? Life change?**





Secret # 5: What is Your Leverage?



- **Social proof?**
- **Carrot?**
- **Stick?**
- **Scarcity or Urgency?**



Secret # 5: Leverage Using Leadership

**Now that's
Leadership!**





Secret # 5: Leverage Using Mission

Mission





Secret # 5: Leverage Using Ethos

Ethos: the leader who embodies the values of the organization

The 'buddy ask'





Secret # 5: Leverage



“Parroting”: In the solicitation use the prospect’s own words, phrasing, reasoning



Secret bonus tip!

Thank and Ye Shall Receive



Secret # 6: Get Out the Toolbox – Gift Range History

	Class of 2001		Class of 2002		Class of 2003		Class of 2004		Class of 2005	
	<i>Bloomfield</i>		<i>Rice</i>		<i>Ryan</i>		<i>Mueller</i>		<i>Hack</i>	
	FY06		FY07		FY08		FY09		FY10	
									<i>As of 5.26.10</i>	
Gift Range										
\$100,000+	2	\$300,000	3	\$386,000	1	\$250,000	3	\$354,999		
\$50,000+	3	\$150,000	1	\$50,000	2	\$101,000			3	\$175,000
\$25,000+	1	\$25,000			1	\$27,000			2	\$50,000
	6	\$475,000	4	\$436,000	4	\$378,000	3	\$354,999	5	\$225,000
		76%		81%		68%		70%		53%
\$10,000+	1	\$10,000			6	\$75,000	2	\$30,000	6	\$60,000
\$5,000+	11	\$58,250	5	\$27,500	7	\$36,150	4	\$22,800	10	\$50,000
	12	\$68,250	5	\$27,500	13	\$111,150	6	\$52,800	16	\$110,000
		11%		5%		20%		10%		26%
\$2,500+	5	\$14,500	6	\$16,250	1	\$2,500	12	\$34,400	5	\$13,760
\$1,000+	33	\$35,275	22	\$24,250	22	\$22,775	25	\$29,210	39	\$42,830
	38	\$49,775	28	\$40,500	23	\$25,275	37	\$63,610	44	\$56,590
		8%		8%		5%		13%		13%
< \$1,000	484	\$33,004	442	\$33,311	486	\$44,222	410	\$37,080	433	\$29,192
C.E.I.										
	484	\$33,004	442	\$33,311	486	\$44,222	410	\$37,080	433	\$29,192
		5%		6%		8%		7%		7%
TOTALS	540	\$626,029	479	\$537,311	526	\$558,647	456	\$508,489	498	\$420,782

Secret # 6: Get Out the Toolbox – Gift Range History (Xth Reunion)

The Softer Ask

	Class of 2001		Class of 2002		Class of 2003		Class of 2004	
	<i>Bloomfield</i>		<i>Rice</i>		<i>Ryan</i>		<i>Mueller</i>	
	FY06		FY07		FY08		FY09	
Gift Range								
\$100,000+	2	\$300,000	3	\$386,000	1	\$250,000	3	\$354,999
\$50,000+	3	\$150,000	1	\$50,000	2	\$101,000		
\$25,000+	1	\$25,000			1	\$27,000		
	6	\$475,000 76%	4	\$436,000 81%	4	\$378,000 68%	3	\$354,999 70%
\$10,000+	1	\$10,000			6	\$75,000	2	\$30,000
> \$5,000+	11	\$58,250	5	\$27,500	7	\$36,150	4	\$22,800
	12	\$68,250 11%	5	\$27,500 5%	13	\$111,150 20%	6	\$52,800 10%
\$2,500+	5	\$14,500	6	\$16,250	1	\$2,500	12	\$34,400
\$1,000+	33	\$35,275	22	\$24,250	22	\$22,775	25	\$29,210
	38	\$49,775 8%	28	\$40,500 8%	23	\$25,275 5%	37	\$63,610 13%
< \$1,000	484	\$33,004	442	\$33,311	486	\$44,222	410	\$37,080
C.E.I.	484	\$33,004 5%	442	\$33,311 6%	486	\$44,222 8%	410	\$37,080 7%
TOTALS	540	\$626,029	479	\$537,311	526	\$558,647	456	\$508,489

The Harder Ask

Secret # 6: Get Out the Toolbox

The Box Chart

The Softer Ask

The Harder Ask

\$5M+	\$5.2M							
\$2M+								
\$1M+	\$1M	\$1M	\$1M	\$1M	\$1M			
\$500,000+	\$730K	\$500K	\$500K	\$500K				
\$250,000+	\$250K	\$250K	\$250K	\$250K	\$250K			
\$100,000+	\$100K	\$100K	\$100K	\$50K \$50K	\$100K	\$138K	\$100K	
	\$100K							
\$50,000+	\$50K							
\$25,000+	\$25K	\$25K	\$25K	\$15K \$10K	\$25K	\$25K	\$25K	
	\$25K							



Secret # 6: Get Out the Toolbox

Don't Ask for Money - Ask for Assets





Secret # 6: Get Out the Toolbox

Up the Ante

\$5K
cash



\$25K
CGA



Secret # 6: Get Out the Toolbox

Up the Ante

\$25K
cash



\$100K
CRUT



Secret # 6: Toolbox Tricks: Speak English, Not 'Planned-giving-ese'



(Psst! Use ANALOGIES)



Secret # 6: Toolbox Tricks

Analogy



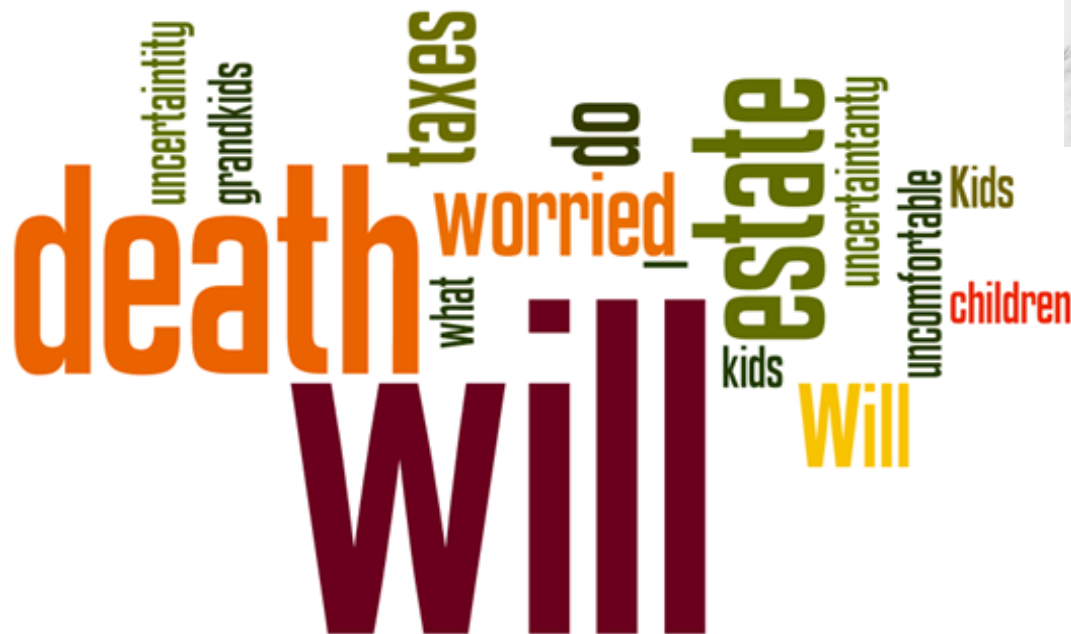


Poll #2

Where will your biggest gifts come from?



Secret Bonus Tip!



“Will” is NOT a four-letter word!





The Bequest Conversation: It's Not an ASK, It's an INQUIRY



“John, Thank you for your support over the years.

Many alumni who have given as generously as you have included our organization in their will.

I'm curious...what are your thoughts on that?”



Poll #3

What's the best way to respond when a prospect says "no" to a gift?



Secret # 7: Respond Effectively to Resistance- Ask Questions

Don't give into resistance; respond to it.

Ask questions.

Identify the prospect's concerns: "PITA"

1. Is it the **P**roject?
2. Is it the **I**nstitution?
3. Is it the **T**iming?
4. Is it the \$ **A**mount?





Secret #7: Respond Effectively to Resistance



Use the prospect's own words.



Secret #7: Respond Effectively to Resistance





Secret #7: Respond Effectively to Resistance -The Pivot

Reframe the conversation:

- Change the field of battle
- Move from the present to the future
- Agree with the prospect and posit another way of looking at it ('and' not 'but')
- Expand, don't contract the discussion – big picture not picayune point



Questions and Answers





Still Have a Question?



Contact: Anne Melvin

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